

**October 24, 2012**

Statement of Work

The Department of Transitional Assistance (Department) has accepted a proposal and is contracting with The Ripples Group as authorized by the Cashless System Commission (Commission) (see Attachment A) on October 18, 2012 and as further authorized by a subcommittee of its members on October 23, 2012. The proposal and quote was received by the Department through the quick quote process on Comm-PASS and in use for PRF46 and revised based on recommendations made by the Commission and its subcommittee.

The Ripples Group will provide assistance in meeting the requirements of Section 5 of Chapter 161 of the Acts of 2012, the text of which is attached hereto as Attachment B. In general, The Ripples Group will work with the Commission, chaired by the Commissioner of Department, to conduct research and assist with the preparation of any recommendations the Commission makes regarding the system of delivery of Department benefits for eligible recipients. The specific scope of work is included in the proposal from The Ripples Group, attached hereto as Attachment C.

A material term of this contract is submission of a draft and final report by The Ripples Group to the Commission to enable the Commission to report its recommendations to the Massachusetts Legislature by December 31, 2012 as required by the statute.

Services provided through this contract will include, but not be limited to, the following:

- Meet with the Commission; take and report minutes of the meetings
- Conduct research and assist with the preparation of recommendations on the feasibility of implementing a cashless payment system and expanding the direct vendor payment system.
- Draft findings and Commission's recommendation report for review by December 15, 2012. The report will include, but not be limited, to the following:
  - The costs associated with and any technological improvements necessary to implement and the time frame required for the expansion;
  - The implementation of a vendor payment system for the non-cash payment of rent and utility bills for all eligible recipients of direct cash assistance; and



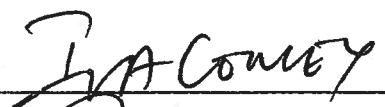

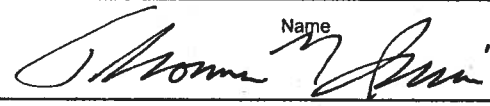
**Statement of Work for  
PRF46, Management Consultants, Program Coordinators and Planner Services**

- o The feasibility of placing fluctuating limitations on the percentage allocated to direct cash assistance and point of sale use.

All other terms of the Statewide PRF46 Contract are hereby incorporated herein.

**Budget:**

The budget for this project is as outlined in Attachment C, subject to the conditions set forth and agreed to under the Statewide PRF46 Contract.

<p>For the Commonwealth or Eligible Entity, Accepted by:</p> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div> <div style="text-align: center; font-size: small;">Name</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div> <div style="text-align: center; font-size: small;">Signature</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px; text-align: center;">10/24/12</div> <div style="text-align: center; font-size: small;">Date</div>	<p>For the Contractor, Accepted by:</p> <div style="border-bottom: 1px solid black; margin-bottom: 5px; text-align: center;">Thomas Innis</div> <div style="text-align: center; font-size: small;">Name</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div> <div style="text-align: center; font-size: small;">Signature</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px; text-align: center;">10/24/12</div> <div style="text-align: center; font-size: small;">Date</div>
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## Appendix A

The Cashless System Commission, so called, was established as required under Section 5 of Chapter 161 of the Acts of 2012 (see Appendix B).

### Commission Membership:

Daniel Curley (Chair), Commissioner of the Department of Transitional Assistance

Senator Jennifer Flanagan

Senator Robert Hedlund

Representative Shaunna O'Connell

Representative Kathi-Anne Reinstein

Gerry McDonough, State Auditor designee

Joshua Giles, Inspector General designee

Deborah Chausse, House of Hope

Tiziana Dearing, Boston Rising



## Appendix B

### SECTION 5, Chapter 161 of the Acts of 2012

Notwithstanding any general or special law to the contrary, there shall be an independent commission to study and report on the development of a cashless payment system in using electronic benefit transfer, or EBT, cards. The commission shall consist of: the commissioner of transitional assistance, or a designee, who shall serve as chair; the inspector general, or a designee; the state auditor, or a designee; 2 members of the house of representatives, 1 of whom shall be appointed by the minority leader; 2 members of the senate, 1 of whom shall be appointed by the minority leader; and 2 persons representing eligible recipients to be appointed by the governor. The commission shall research, assess and develop recommendations to implement a cashless payment system and investigate and report on the feasibility of expanding the direct vendor payment system: (i) under [direct vendor payments section]; and (ii) for rent and utility payments for all eligible recipients. The commission shall hire an independent consultant to conduct the research and assist with the preparation of any recommendations. The report shall include, but not be limited to, the following: (1) the costs associated with and any technological improvements necessary to implement and the time frame required for the expansion; (2) the implementation of a vendor payment system for the non-cash payment of rent and utility bills for all eligible recipients of direct cash assistance; and (3) the feasibility of placing fluctuating limitations on the percentage allocated to direct cash assistance and point of sale use. The commission shall submit a final report of its findings and recommendations, together with drafts of legislation necessary to implement those recommendations, by filing the same with the clerks of the senate and house on or before December 31, 2012.





## Attachment C

**The Ripples Group**

October 24, 2012

To: Members of the Commission  
From: Atilla Habip, The Ripples Group  
Re: Management Consultant RFR

Please accept this document as an addendum to our original proposal dated October 12, 2012. Based on our meeting with the Commission on October 18, 2012, we propose the following framing and approach to the project.

### **The Objective and Deliverables of the Project**

The objective is to assess various options for improving the integrity of EBT payment flows in order to:

- Reduce fraud and inappropriate use of DTA cash assistance funds (TAFDC and EAEDC)
- Improve the user experience for clients and vendors of DTA to ensure clients receive needed support
- Reduce operating costs

It is understood that these objectives may be somewhat contradictory in practice. For instance, a system that lowers the likelihood of fraud might have higher operating costs.

Given these objectives, the final deliverable of the project is a well-articulated, fact-driven, and compelling report that outlines:

- Full range of options considered
- Evaluation criteria
- Assessment of options using the evaluation criteria, including cost-benefit analysis from stakeholders' perspectives
- Final recommendation on the future approach, including specific technology choices and other recommendations
- High-level implementation plan to get to the desired future state

The final report will be delivered as a Word document, along with a PowerPoint containing appendices with extensive back-up information.

### **Key Questions & Framing**

This study aims to explore the technology, cost and benefit considerations in order to develop a detailed and actionable set of recommendations. The main questions include:

# The Ripples Group

- What options for change are available to the State? If they are feasible, how much will they cost? If they are not feasible, why not?
- What will be the costs and benefits of turning off specific ATM and/or POS locations (in and out of state) where EBT transactions are accepted? What precisely is possible given the state of technology today?
- What are the implications of preventing certain items (UPC level) in EBT transactions? This has much more technological complexity and falls outside the boundaries of traditional credit/debit flows.
- How will access for clients be impacted by any changes?
- What are costs and benefits of limiting ATM cash access with EBT cards?
- Are there other measures (audits, penalties, etc.) that can improve the security and control of cash use?
- What is DTA's capacity to deal with technological complexity? How can it be enhanced? At what level of complexity is a solution simply impractical?
- What will be the operational requirements to sustain the selected option—e.g. maintenance of up-to-date restricted POS/ATM lists or UPC lists, "secret shopper" audits, etc.?
- What will be the legislative impact of the selected options for change? What policy changes would be necessary for an option to be feasible?

We suggest the following framing as a starting point, recognizing that it will improve as we learn more and work closely with the Commission.

	Option 1	Option 2	Option 3	....	Option n
<b>Technical Feasibility</b>	<ul style="list-style-type: none"> <li>• Can it be made to work with reasonable time and effort?</li> <li>• Can stakeholders (vendors, third party processors) cope with it technically?</li> </ul>				
<b>Implementation Cost &amp; Time</b>	<ul style="list-style-type: none"> <li>• What will take to implement it?</li> <li>• Does DTA have, or can DTA acquire such capacity?</li> </ul>				
<b>Operational Costs/Savings</b>	<ul style="list-style-type: none"> <li>• What is DTA's capacity to deal with operational complexity?</li> <li>• What will be the financial impact on operations?</li> <li>• In particular, what are the ongoing access point/data monitoring requirements? What are the costs of enforcement activities?</li> </ul>				
<b>Impact on Clients &amp; Vendors</b>	<ul style="list-style-type: none"> <li>• What will be the impact on clients' access to benefits? Is there a minimum access threshold for all options considered?</li> <li>• How will clients view the solution?</li> <li>• What will be its impact on vendors?</li> </ul>				
<b>Security/Control Benefits</b>	<ul style="list-style-type: none"> <li>• How much improvement can it achieve in fraud detection and prevention of inappropriate spend?</li> <li>• Are there other ways to nudge clients to change behaviors (e.g. higher penalties, audits)?</li> </ul>				

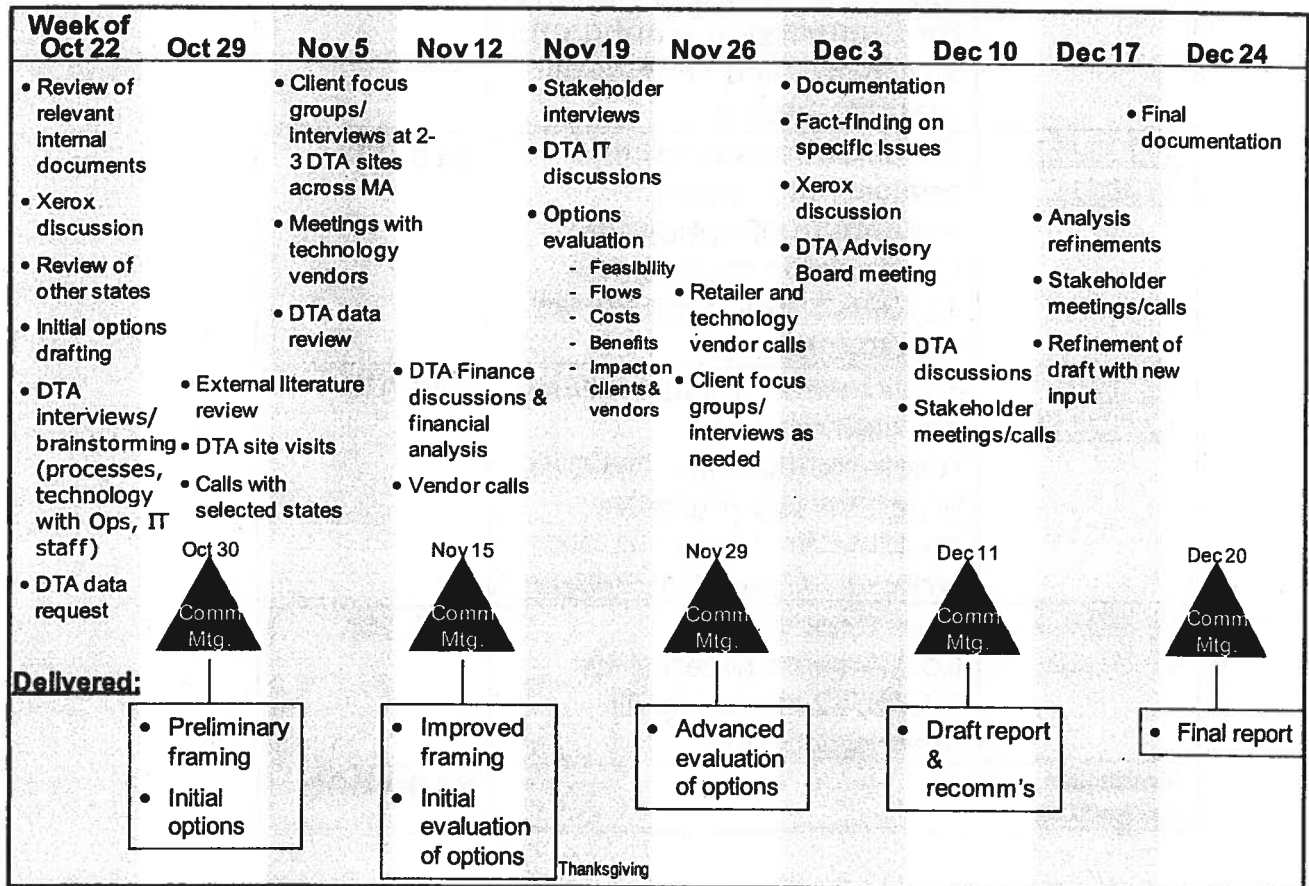
# The Ripples Group

While all attempts should be made to quantify options against such criteria, the project will inevitably require a common sense screen, as some judgments will need to be made on the capabilities of technology vendors, retailers, and DTA itself, balanced against client needs and usability.

## Project Approach

Based on what we have learned so far, we have created a workplan that leads to project completion by December 31, 2012, incorporating the meeting days already established for the Commission. We realize that this is an aggressive timeline and, frankly, would not have proposed it if we did not have significant knowledge of EBT systems already.

Outlined below are the major activities we envision (excluding Ripples team operations) and the deliverables per Commission meeting:



We are used to working with tight deadlines and can deliver on this plan as long as the Commission members and DTA resources can participate in a timely manner, open doors, and provide information as needed. If there were a way to stretch the timeline, we would of course favor this extension as it would enable more extensive stakeholder engagement than what is shown above. However, this may not change the outcome in any significant way, since we suspect that main drivers will become visible early on.

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## Pricing Proposal

This will be a team effort, involving senior and junior resources. Atilla Habip, a founding partner of Ripples, will have overall responsibility. The pricing structure will be as follows:

10/22/12- 10/31/12	Immersion, preliminary framing, initial options for Commission meeting on 10/30/12, and write-up of meeting output	\$14,000
11/1/12 - 11/16/12	Continued research and analysis, improved framing, initial evaluation of options for Commission meeting on 11/15/12, and write-up of meeting output	\$10,000
<u>11/17/12 -</u> <u>11/30/12</u>	Continued research and analysis, advanced evaluation of options for Commission meeting on 11/29/12, and write-up of meeting output	\$10,000
<u>12/1/12 -</u> <u>12/12/12</u>	Final research and analysis, development of recommendations, draft of report for Commission meeting on 12/11/12, and write-up of meeting output	\$20,000
12/20/12 - 12/30/12	Final Report for Commission meeting on 12/20/12, write-up of meeting output.	\$46,000
<b>Maximum Obligation</b>		<b>\$100,000</b>

October 12, 2012

Christopher Silva  
Director of Administrative Operations  
600 Washington Street  
Boston, MA, 02111

RE: Management Consultant – Commission

Dear Mr. Silva:

We appreciate the opportunity to respond to the Management Consultant – Commission RFQ under PRF46.

We have carried out dozens of projects at various Commonwealth agencies over the last decade, some of which are outlined in our proposal. We have deep expertise in EBT and related technologies and are currently engaged with the MA WIC program to design and implement an EBT solution to replace food checks.

As the Request for Quote contained limited information on the specifics of work requirements and timing, we have included only a high-level work plan. We suggest developing a detailed plan after further consultation with the Commission and DTA leadership.

Please contact me with any questions or suggestions on this proposal. We are available to meet with you in person at your convenience (if preferred, at our offices at 3 School Street, only a few blocks from DTA). Our MA vendor code is VC 0000420961. I can be reached at (617) 513-2959 or ahabip@ripplesgroup.com.

We thank you for the opportunity and look forward to your feedback.

Sincerely,



Atilla Habip  
Partner

# **The Ripples Group**

## **Brief Company Background**

The Ripples Group, LLC was founded in 2000 by experienced consultants. Based in Boston, we serve local, national, and international clients. We offer a broad spectrum of professional services and have a deep specialty in strategic planning and technology implementation. In 2007 we acquired the consulting assets of ProVention Inc., which increased our public sector exposure.

We have worked with many agencies of the Commonwealth, including the Massachusetts Department of Public Health (DPH), MassHealth, the Department of Early Education and Care (EEC), the Massachusetts School Building Authority (MSBA), the Operational Services Division (OSD), and MA Trial Courts. Furthermore, Ripples was recently selected by the MA Executive Office of Health and Human Services (EOHHS) to project manage the implementation of the Affordable Care Act (ACA) in the Commonwealth. While we have not worked directly with DTA, some of our projects have brought us in contact with the Department: our recent OSD project involved DTA's print operations, and we have presented our approach to MassHealth's EDM implementation to DTA management.

In addition to our long history of project work in the public sector, we serve many well-known companies around the world such as Unilever, Pfizer, AOL, Akzo Nobel, and Alcatel-Lucent. We also carry out projects for non-profits such as the National Association of Fire Protection and the Society of Organizational Learning at MIT.

We work hard to ask the right questions, to structure ideas, to carry out high-impact analytics, and to facilitate a collaborative process with our clients. The key principles we apply in such initiatives are:

- Fact-driven, analytical approach (learn the issues in depth, use carefully synthesized data to support ideas and build consensus)
- Learning from external sources (don't remain introverted, benchmark against others, i.e. learn from other similar efforts)
- Appreciative inquiry and engaged dialogue (build on the organization's strengths, using dialogue to generate new ideas, also involve stakeholders)
- Sensitivity to organizational dynamics (even the first open-ended question is an intervention)
- Carefully structured and transparent decision making (it should be easy to explain why and how a decision was made)

Furthermore, Ripples partners have published numerous books and articles on various aspects of leadership, strategy, corporate responsibility, and finance. Relevant highlights are: (1) *To The Desert and Back*, a management book co-authored by Dr. Karen Ayas and translated to many languages including Chinese, tells the detailed story of a large-scale transformation at Unilever; (2) *Design for Learning for Innovation*, an academic book by Dr. Ayas, lays out a framework for managing complex projects; (3) "Winning Strategies," an article by Atilla Habip, draws parallels between strategic and scientific thinking.

For more information about Ripples, please visit our website, [www.ripplesgroup.com](http://www.ripplesgroup.com).

## **Relevant Experience**

We have very deep and broad experience working with Commonwealth agencies. The section below provides two concrete examples of engagements highly relevant to this RFQ. In the table that follows, we also list multiple projects illustrative of our diverse engagements with state agencies.

### **WIC EBT Implementation Planning**

Since January 2012, we have supported the Massachusetts WIC program in assessing the feasibility of implementing EBT benefits, and we have developed a USDA-approved implementation plan for moving from the paper check process to an EBT system. As a result, we are highly familiar with EBT technologies and strategies across multiple states, including:

- Smart cards
- Integrated and stand-beside systems
- Farmers market technologies
- Mobile transaction processing
- Payment transfer systems

Development of the WIC EBT implementation plan included extensive review of the MA WIC program, both from a technological standpoint and from an organizational perspective to ensure that the program could support the identified EBT technology with a focus on:

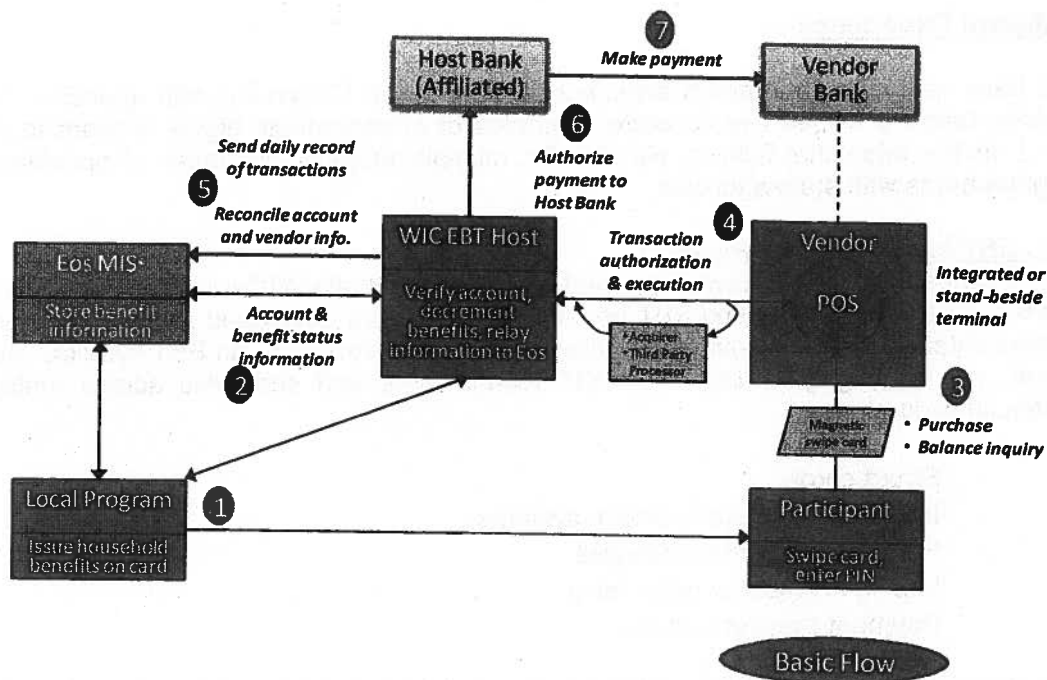
- Understanding the current program and capacity for change
- Reviewing existing program IT systems and their configurability
- Assessing the costs and expected benefits of technology and integration options
- Identifying banking contract changes and options within the current- and future-state systems
- Studying other state implementation practices and determining key lessons for MA WIC

As part of the planning process, Ripples facilitated engagement with multiple stakeholders including field staff and the MA WIC Vendor (retailer) Advisory Council. Such stakeholder engagement has played a key role in developing awareness of the case for change and supporting the decision making process.

In addition, Ripples manager Tom Innis was invited by USDA to present our approach to EBT Feasibility Studies at a National USDA Conference held in Washington, DC this past August.

The diagram below illustrates the future-state EBT system in MA.

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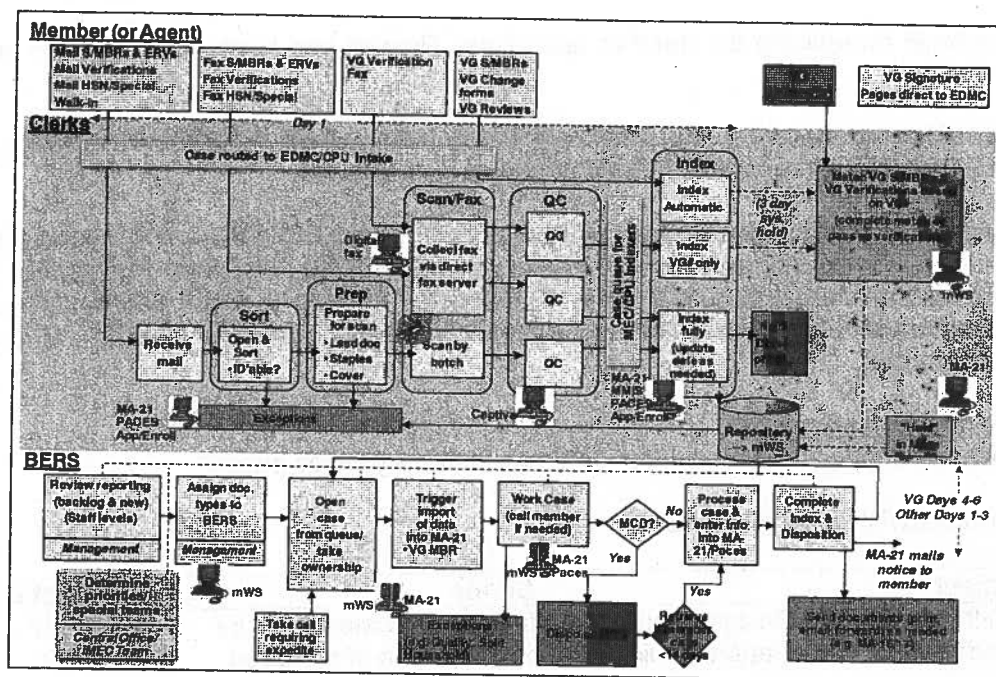
### MassHealth Electronic Document Management

The Electronic Document Management (EDM) project for MassHealth began with the goal of converting the majority of statewide operations from paper-based to electronic processing. The engagement started with an initial assessment phase leading to the design of the Taunton pilot, which in turn led to statewide roll-out over the last 18 months. MassHealth now processes 98% of incoming documents via electronic imaging.

The initial assessment and pilot design were carried out by a Ripples team working closely with the Taunton enrollment center (MEC) and the Central Filing Unit (CFU, now EDMC). In the course of this initial phase, "to-be" workflows such as the one below were created:

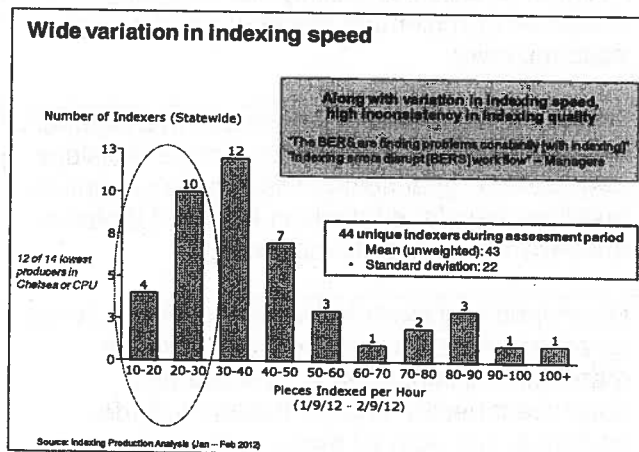


# The Ripples Group



Ripples also worked closely with IT partners to ensure that the development addressed business needs adequately. When the pilot started, the Ripples team was on the ground, supporting the implementation. In parallel, Ripples led the assessment of the other MECs and the Central Processing Unit (CPU), developing detailed plans to prepare these operations for statewide EDM.

After both pilot and statewide roll-out, Ripples carried out an assessment of the EDM implementation for MassHealth. These assessments were conducted at a detailed operational level, addressing, for instance, individual performance variations:



Throughout the EDM transition, Ripples has led many aspects of the project and supported others. The Ripples team has collaborated closely with IT resources and field operations, gaining trust and respect. From weekly meetings—daily at the beginning of the pilot—to focus groups and in-depth data analysis, from hands-on support of

## **The Ripples Group**

personnel to advising the head of operations, Ripples has been integral to the success of EDM.

Two Ripples consultants, Atilla Habip and Tom Innis, received certificates of recognition from EOHHS for their contributions to the project's success.

In fact, on the four occasions when MassHealth faced a dramatic change in the last decade—UCP transition, MA Health Care Reform, EDM, and now the Federal Health Care reform—the executive team consistently turned to The Ripples Group for assistance with business processes, technology feasibility studies, analytics, and project management.

### **Additional Experience**

Further examples of our work for Commonwealth agencies include:

For MA EOHHS, DPH, and EEC:

<b>Project</b>	<b>Scope</b>	<b>Contract Dates</b>
BFHN Bureau Leadership Development	Designed quarterly strategic retreats for senior leaders. Guided the development of a shared vision, mission, and set of priorities.	Sept 2007 – Jun 2009
Financial Modeling and Strategic Planning, Early Intervention Program	Analyzed Early Intervention enrollment and fiscal data to provide recommendations on cost reduction options.	Sept 2007 – Feb 2009
Strategic Planning, Children and Youth with Special Health Care Needs	Planned and directed quarterly all-staff retreats focused on team-building to develop a vision, mission, and key objectives for the CYSHCN Program. Facilitated weekly sub-program meetings to implement objectives and ensure accountability.	Aug 2008 – Dec 2009
Balanced Scorecard – BFHN	Introduced the balanced scorecard management tool and facilitated its adoption across Divisions. Led strategic goal-setting sessions to set annual priorities, developed tracking tool, and directed quarterly accountability meetings.	Jun 2008 – Jun 2010
Maternal Child Health Block Grant Needs Assessment	Developed and executed analysis plan covering an assessment of the current outcomes of maternal and infant health, children and adolescent health, and the health of children and youth with special health care needs. Reviewed public and private sector capacity to support health services for target populations including direct and enabling services, population based services, and infrastructure. Led weekly research meetings, organized focus	May 2009 – Sep 2010

## The Ripples Group

	groups, public hearings, and stakeholder interviews, and guided and edited a 360+ page formal written submission.	
Operating Model design, MassCARE	Recommended a revised model of care to optimize fiscal resources and serve the most at-risk populations in select geographic areas. Synthesized epidemiological data and interviewed key stakeholders, including consumers and providers, to produce a collaborative, data-driven approach that responded to changing demographic trends.	Aug 2009 – Mar 2010
Home Visiting Needs Assessment	Provided project management to lead the Massachusetts response to the federal Home Visiting grant application. Spearheaded data collection and synthesis to produce a community-level needs assessment that identified the most at-risk communities in Massachusetts. Analyzed community needs and capacity through an online survey. Organized public listening sessions and key information interviews. Facilitated weekly cross-agency workgroup and research team meetings. Supported monthly cross-agency leadership meetings at the Commissioner level. Guided the strategic decision-making process on which home visiting models to select for the highest risk communities.	May 2010 – Jun 2011
Strategic Planning, Universal Newborn Hearing Screening	Created a 5-year strategic plan for the Universal Newborn Hearing Screening program. Facilitated brainstorming sessions with staff, conducted state interviews and led an all-day symposium with key stakeholders including parents to identify key priorities, solidify the mission, and lay out the strategic options.	Oct 2010 – Jan 2011
Massachusetts Home Visiting Initiative (MHVI)	Provided strategic and organizational support to the teams implementing the new federally funded program. Activities involved major coordination between state agencies with overlapping coverage areas. Facilitated Leadership team and implementation teams. Provided logistical and organizational support for planning of Home Visiting Retreats and Forums (use of Ripples Group facilities for meetings when appropriate). Coaching/mentoring of key BFHN staff, especially new employees.	Jul 2011 – Present
WIC Performance Management	Designed a new performance management system for WIC vendors (local programs).  Project included a detailed data-driven	Jul 2007 – Sep 2009

## The Ripples Group

	assessment of performance across 35 vendors, prioritization of improvement opportunities, and development of a new system based on balanced scorecard principles. Development included facilitation of a workgroup with representation from the local programs meeting over several months to ensure engagement in and acceptance of the new system.	
WIC Cost Neutrality	<p>Created a dynamic financial model that compared the \$90M food cost of the old WIC food package against the newly revised federal food package rule.</p> <p>Analysis included breakdown of participants, food prices, food volumes and inflation along with sensitivities. Project team developed and presented recommendations to the WIC Advisory Board.</p> <p>Phase 2 includes the rebuild of the model to serve as an ongoing budget planning tool.</p>	<p>Phase 1: Jul 2008 – Feb 2009</p> <p>Phase 2: Jun 2010 – Present</p>
Breastfeeding Performance Improvement	With the goal of improving initiation and duration rates for breastfeeding among WIC participants, project included data analysis and presentation, meeting facilitation with Breastfeeding Coordinators and Peer Counselors, and best practice research and sharing with other states. Focus was on continuous improvement and greater participant support.	Aug 2008 – Present
Survey of WIC Participants	<p>Surveyed participants to develop an understanding of participant satisfaction.</p> <p>Survey logic was based on the most recent developments in consumer satisfaction, including modified net promoter score and business reply mailing to ensure anonymity of participants. Compiled results for a local program breakdown of participant satisfaction and the drivers of participant satisfaction.</p>	<p>Phase 1: Jan 2009 – Jun 2009</p> <p>Phase 2: Jan 2010 – Jun 2010</p>
Survey of Local Program Staff Satisfaction	Developed an online survey of all WIC staff working in local program offices. Assessed the level of satisfaction with the WIC State Office, including breakout by business unit to improve program management.	May 2010 – Jul 2010
WIC Strategic Planning	Guided the Nutrition Division/WIC leadership team to develop a comprehensive 5-year	Sep 2010 – Present

## The Ripples Group

	strategic plan for the Nutrition Division. Project included in-depth data analysis, best practices research and interviews with other states, brainstorming sessions, and facilitation.	
WIC Branding	Directly supported the branding initiative coming out of the WIC Strategic Plan to develop a core messaging and communications plan.	May 2011 – Dec 2011
Strategic Planning for Unintentional Injury and Control	Created a 5-year strategic plan for the Unintentional Injury and Control program. Facilitated brainstorming sessions, conducted data analysis, interviewed stakeholders, and supported MassPINN meetings.	Aug 2010 – Dec 2010
Women's Health Network New Program Design	Developed a new program design following MA Health Care Reform, which severely impacted the Women's Health program and necessitated significant changes in its operations.  Project included design of a new operating model, RFR support, selection of IT platform, and communications with provider community.	Jul 2007 – Jun 2008
Performance Management Project	Developed and supported an analytical dashboard to equip the management team and contract managers of WHN/MHP with tools and analysis for data-driven performance management of the care coordination program, including the performance of its contactors.	Jul 2008 – Jun 2011
WHN Program Model Development	Supported WHN in developing a response for funding by helping create an operating model that is aligned with stakeholder needs and capabilities as well as DPH objectives and resources. Developed internal consensus and momentum towards an RFR and execution of the new model. Supported external engagement that laid the groundwork for a successful RFR and implementation of the new model.	Jan 2012 – Apr 2012
Bureau of Substance Abuse Services (BSAS) Health Outcomes & Performance Management	Developed insights into BSAS practices and program priorities. Project has included development of a new, advanced database for BSAS clients and analysis of data for outcomes and provider performance.	Jul 2005- Present
BSAS Care Coordination – Youth Residential	Reviewed process for improvement of youth recovery home care coordination. Project included detailed process mapping and changes in data collection (new assessments	Sep 2006 – Jun 2009

## **The Ripples Group**

Program	introduced). Also modified computer systems to better serve new processes.	
Pay for Performance	Designed new performance management system for BSAS providers, including a "bonus" for performance excellence, in collaboration with Brandeis University.	Nov 2007 – Jun 2009
BSAS Activity Management Project	Provided the BSAS Office of Data Analytics and Decision Support (ODADS) with a well-documented, consistent, and efficient approach to receiving and processing requests for information.	Jul 2009 – Present
BSAS Research Support Project	Provided data management, analysis, and consultation support on research efforts supporting collaboration with university, state, and federal organizations as research partners.	Jul 2009 – Present
MECCS Initiative and Young Children's Interagency Working Group	Developed strategic plan for a Comprehensive Care System for early childhood behavioral health with partners of a cross-agency early childhood initiative.	Dec 2007 – Apr 2010
Strategic Planning and Needs Assessment for Head Start State Collaborations Office	Developed a strategic plan for the Head Start State Collaboration Office based on a local Head Start provider assessment.  Combined program participant and outcome data with the findings of a unique collaboration needs assessment. Further explored key findings through focus groups and interviews with key program representatives.	Nov 2008 – Aug 2009
Early Education and Care Survey of Providers	Implemented an online survey of child care providers to better understand uses of EEC supportive funds and their impact on clients.	May 2008 – Jun 2008
CSEFEL Story Project	Engaged with demonstration and implementation sites to understand the impact of the Pyramid Model of early childhood engagement. Worked with stakeholders to create a narrative for communication to other agencies.	Jul 2012 – Present

## **The Ripples Group**

For EOHHS and MassHealth:

<b>Project</b>	<b>Scope</b>	<b>Contract Dates</b>
Capacity Analysis – Central Processing Unit/Central Filing Unit	Reviewed MassHealth operations to align capacity with new volume (changes in Uncompensated Care Pool regulations) and technology (introduction of the Virtual Gateway). Included detailed process mapping of current operations and design of future processes.	Jul 2007 – Jun 2008
Operations Improvement, Business Process Design, and Electronic Document Management System Integration	Reviewed operations of all MassHealth member processing, including the MassHealth Enrollment Centers, Central Processing Unit and Central Filing Unit to develop a revised workflow and specifications for the implementation of an Electronic Document Management system that makes the operation nearly paperless. Included building consensus and momentum in the organization and making recommendations for resource realignment.	Oct 2009 – Feb 2012
Affordable Care Act Project Management & Implementation Support	Provided executive guidance and served as the Project Management Office for MassHealth's implementation of changes under ACA, including collaboration with the Massachusetts Connector Authority as it develops into the federal health exchange model.	May 2012 – Present

# **The Ripples Group**

## **Staff Resumes**

Ripples Founding Partner Atilla Habip will have full responsibility for the engagement.

### **Atilla Habip**

Atilla Habip has enjoyed a distinguished career as a management consultant and senior executive. Mr. Habip is a founding Partner of The Ripples Group, leading its public sector practice.

Mr. Habip started his consulting career at Bain & Company, serving clients in the US and Europe for seven years. His clients included major high-tech companies, multi-nationals in consumer goods, and companies in the life sciences and health care. Mr. Habip also led the development of Bain's Growth Strategy and Operational Excellence frameworks. Mr. Habip served as CEO for CitizensHealth, a start-up that launched *the first drug discount card in the US*.

Earlier in his career, Mr. Habip held several engineering and management positions with International Paper, where, in his last position, he was the Plant Manager for the Framingham packaging facility.

Professional accomplishments include:

- ◆ Mr. Habip has conducted dozens of projects for the Commonwealth of MA, ranging from detailed process mapping and capacity analysis for MassHealth operations to strategic planning at the Department of Public Health. He has been involved with over 100 HHS programs.
- ◆ Working with former Congressman Joe Kennedy, Mr. Habip launched a health care membership company. As the first CEO of the business, Mr. Habip negotiated partnerships and alliances that led to a provider network of 500,000 physicians and 3,000 hospitals.
- ◆ Mr. Habip has led or participated in 50+ strategic consulting engagements with commercial clients. These have included several mergers and acquisitions (including the largest merger in Europe), major strategic shifts, and business model changes. In addition, Mr. Habip was the senior consultant behind an Israeli biotech's successful IPO in the US.
- ◆ Mr. Habip has also led several major transformation efforts for clients. For instance, he served as the project manager for the post-merger integration of two large pharmaceutical companies.
- ◆ As Plant Manager, Mr. Habip turned around an International Paper packaging facility that was scheduled to be shut down, and he grew it to capture 80% of the New England market.

Mr. Habip earned his BS in Industrial Engineering and MBA in International Business and Finance from Columbia University. He has returned to Columbia over the years to lecture on strategy and operational excellence.



## The Ripples Group

Below is a sample of Ripples partners and consultants who could be working on the DTA initiative:

### **Karen Ayas**

Dr. Karen Ayas is a respected scholar, author, and consultant with expertise in change management, organizational design, learning organizations, and leadership development. Dr. Ayas trained as an industrial engineer and started her career in human resources, serving as HR Director for two major Israeli hospitals.

After earning her doctorate degree, Dr. Ayas has consulted for numerous commercial and public-sector clients in the US, Europe, and Asia. She has published several books and dozens of articles on leadership, change management, learning organizations, project management, design for innovation, and community building.

Over the past five years, Dr. Ayas has served Ripples clients in an advisory capacity. Dr. Ayas also teaches at the Babson College Executive Education School. She has been a board member of the Society for Organizational Learning and a member of the Strategic Planning Committee of the Boston Club.

Professional accomplishments include:

- ◆ Dr. Ayas has led many projects for EOHHS agencies in MA. These projects served the Department of Public Health, MassHealth, and the Department of Early Education and Care. Some recent examples of her work are:
  - The Massachusetts Early Childhood Comprehensive Systems (MECCS) Initiative involving seven public agencies (now called Young Children's Council)
  - Bureau of Family Health and Nutrition strategic planning and balanced scorecard implementation
  - WIC local agency performance management project
- ◆ Dr. Ayas has advised and coached many senior executives in the US and internationally. For instance, her innovative work with Tex Gunning, a top leader in Unilever, is documented in the highly acclaimed book *To The Desert and Back*, which she co-authored.
- ◆ In the recently published book *Business Leadership*, which represents some of the best thinking on leadership in the business world, Dr. Ayas co-authored a chapter on leadership development, reflecting in part on lessons she learned while working with leadership teams across the globe.
- ◆ Dr. Ayas helped launch and served as Editor for *Reflections*, an MIT Press journal, with Professor Ed Schein (organizational culture expert) and Dr. Peter Senge (learning organizations expert).

Dr. Ayas earned her BS and MS degrees in Industrial Engineering at the Technion, Israeli Institute of Technology, and her PhD in Management of Innovation at Erasmus University in Rotterdam, the Netherlands.

## **The Ripples Group**

### **Mete Habip**

A Partner at The Ripples Group, Mete Habip is a seasoned consultant and executive with a track record of accomplishments in the consumer goods, technology, and health care industries. Prior to working at Ripples, Mr. Habip served as the VP of Corporate Performance at MedAssets, Inc., a publicly traded health care IT company. He also served as the General Manager of one of MedAssets's largest software subsidiaries and as Manager in the company's Mergers and Acquisitions group.

Trained as a food engineer, Mr. Habip began his career as a food technology consultant at the International Food Network and subsequently joined Pepsi-Cola as a Field Engineer. At Pepsi, he led the commercialization of new products and the implementation of new manufacturing processes. In addition, Mr. Habip spent two years after business school as a management consultant with Marakon Associates, an international consulting firm, where he focused on strategy development in the consumer goods and consumer finance industries.

Professional accomplishments include:

- ◆ Operations turn-around of an unprofitable software company. As GM, Mr. Habip led the restructuring of the organization, rationalized the product portfolio, and instituted cost-based pricing. The business doubled sales and achieved a 25% EBITDA margin in two years.
- ◆ Mr. Habip led the project to consolidate print operations in MA – for OSD. Currently, he is leading the implementation of ACA in MA.
- ◆ Reengineering of MedAssets's finance and accounting systems. Mr. Habip led a redesign of the company's internal reporting processes and managed the team that implemented the recommended and Board-approved solution.
- ◆ Team leadership for managing the scale-up of new manufacturing processes enabling Pepsi-Cola to enter the alternative beverage market with Lipton Iced Teas and Starbucks Frappuccino. Both product lines are currently leaders in their respective markets.
- ◆ Coordination of product development projects for a food industry consultancy. Mr. Habip led the development and facilitated the international market launch of a specialty flavor for a major ice cream manufacturer in the US.
- ◆ Development of growth strategy for the third-largest beverage manufacturer in the US. Mr. Habip advised the consulting team whose recommendations led to a \$1.5 billion acquisition.

Mr. Habip holds a BS in Food Science and a MEng in Chemical Engineering from Cornell University, as well as an MBA from Harvard Business School.

## **The Ripples Group**

### **Thomas Innis**

Thomas Innis is a Manager with The Ripples Group, a Boston-based boutique management consulting firm. Mr. Innis has experience serving public and private sector clients across the health and life science industries, including hospitals, pharmaceuticals, and multiple health-related state agencies. He has expertise in strategy development, business process review, financial analysis, facilitation, technology integration, and project management.

Prior to working at The Ripples Group, Mr. Innis was a Project Manager with ProVentive Inc., a Boston-based business advisory and health technology company, and a Consultant with Deloitte Consulting, LLP. At Deloitte, he worked with clients of the strategy and operations group in the health care industry and public health sector. He began his career as an analyst and product consultant in the financial services industry.

Professional accomplishments include:

- ◆ Creation of the MA WIC federally approved EBT implementation plan to move the organization from a paper-based system to a credit card-style transaction system for the Massachusetts WIC program's \$90M food benefit budget.
- ◆ Development and execution of an analysis plan for the Department of Public Health's 2010 Federal Title V MCH block grant, which guides approximately \$80M in program funding annually. Mr. Innis guided and edited a 360+ page formal written submission.
- ◆ Development of a Pay-for-Performance framework for MA Bureau of Substance Abuse Services programs, including site visits to select programs to improve data capture, creation of a service gap analysis, and creation of an interactive performance management dashboard.
- ◆ Assessment of EEC Head Start Collaborations Office through provider surveys and focus groups to inform the MA Head Start strategic plan.
- ◆ Development of a roadmap for the consolidation and transformation of the financial function supporting the Maine Department of Health and Human Services, based on extensive mapping, data analysis, and interviews, incorporating industry best practices to improve service to internal and external stakeholders.
- ◆ Redesign of MassHealth operations and development of baseline IT system requirements supporting the implementation of an Electronic Document Management system. The project involved building consensus and momentum within the organization and making recommendations for resource realignment based on data-supported process modeling.

Mr. Innis earned his BA in Economics with a Certificate in International Relations at the University of Massachusetts, Amherst. He holds both an MS in Health Care Policy and Management and an MBA from Carnegie Mellon University.

## **The Ripples Group**

### **Darina Skvarkova**

Ms. Darina Skvarkova is a Senior Consultant with expertise in business process design, portfolio evaluation, and market development strategy. She has worked for several US and multinational clients on a variety of management consulting assignments, including assisting a global consumer goods company with corporate change and evaluating market expansion opportunities. Ms. Skvarkova has expertise in market research in the public health and life sciences fields, and she has assisted numerous pharmaceutical companies on major strategic portfolio decisions.

Since 2003, Ms. Skvarkova has worked as an independent Senior Management Consultant supporting The Ripples Group on engagements across multiple industries on an ad hoc basis. Prior to holding this position, she gained professional experience conducting research at the Innosight Institute, a non-profit think tank, and managing imports for several businesses in her native Bratislava, Slovakia.

Professional accomplishments include:

- ◆ Documented existing business processes and designed optimal future-state workflows for several health care programs in a major MA public health organization
- ◆ Conducted primary and secondary market research leading to the portfolio evaluation of a pharmaceutical start-up company and advised the client on major strategic portfolio decisions
- ◆ Assisted the CEO of a global consumer goods company with corporate change in its Asian division
- ◆ Evaluated international market expansion opportunities for several multi-national corporations as part of development strategy projects

Ms. Skvarkova earned her MS in Economics from the University of Economics in Bratislava, Slovakia. In addition, she holds a certificate in Advanced English from Merton Community College in England.

## **The Ripples Group**

### **Marina Fisher**

Marina Fisher is a Senior Consultant at The Ripples Group with experience in the health care, pharmaceutical and agricultural equipment industries.

Before entering the consulting field, Ms. Fisher was a research fellow in Europe investigating shifting attitudes toward second language education as a recipient of the prestigious Henry Russell Shaw Traveling Fellowship. She also held a number of teaching- and mentoring-related positions concurrent with her academic career.

Professional accomplishments include:

- Ms. Fisher has served the Commonwealth of MA on a number of health-related projects:
  - Mapped out detailed current-state process flows at several Enrollment Centers as part of a large-scale operations redesign for MassHealth
  - Drew upon observations of the day-to-day operations of the MassHealth Electronic Document Management pilot in order to provide strategies for improving operating efficiency
  - Helped structure and facilitate discussions leading to the creation of a new five-year strategic plan for the MA Department of Public Health's Unintentional Injury Prevention and Control program
- Ms. Fisher supported a comprehensive life sciences project in Boston:
  - Built up an extensive awareness of the current setbacks and opportunities facing the US hospital antibiotics market
  - Helped a biotech company evaluate the positioning of the drugs in its pipeline
  - Created a complex, scenario-driven financial model to calculate the quarterly expected value of three drugs over a five-year time span
- Ms. Fisher has worked on setting a strategic trajectory for a major global manufacturer of agricultural equipment:
  - Conducted in-depth interviews of equipment dealers around the country
  - Synthesized data from a variety of industry reports to create a meaningful picture of the agricultural market and its future development
  - Designed a survey of agricultural equipment consumers and administered it at a major agricultural exposition

Ms. Fisher earned her BA in Linguistics from Harvard University. She is fluent in three languages.

## **The Ripples Group**

### **Jesse Horan**

Jesse Horan is a Consultant at The Ripples Group with experience in the public and private sectors, serving clients in public health & health services, manufacturing, and non-profit industries.

Prior to joining The Ripples Group, Mr. Horan worked as an Associate at The Hill Group Inc., a management consulting firm specializing in Strategy, Operations, and Measurement located in Pittsburgh, Pennsylvania, where he developed skills in data analysis, market research, and process improvement.

Professional accomplishments include:

- Mr. Horan has provided project management and facilitation services to the Massachusetts Department of Public Health to in the development a new state-wide, evidence-based program intended to provide health services for at-risk families.
- At The Hill Group, Mr. Horan provided in-depth market research for a health system experiencing operating deficits, detailing major surgery market shares and providing root cause analysis for volume and margin declines.
- Mr. Horan worked with a federally-funded non-profit to conduct an organizational evaluation focusing on sustainability, efficacy, and community collaboration based on more than 15-years of program data.
- Mr. Horan drafted a whitepaper analyzing the threats and opportunities facing public libraries, which was used as the discussion point for future program development for a federated library system.

Mr. Horan earned his BA in Economics from Allegheny College and his MS in Public Policy & Management from Carnegie Mellon University.

## **The Ripples Group**

### **William Goldsmith**

William Goldsmith is a Consultant at The Ripples Group with experience in the public sector, serving clients in public health & education.

Prior to joining The Ripples Group, Mr. Goldsmith worked as a researcher at Conservation International, a non-profit environmental organization in Washington, DC, where he developed skills in data analysis, workflow coordination, and project administration.

Professional accomplishments include:

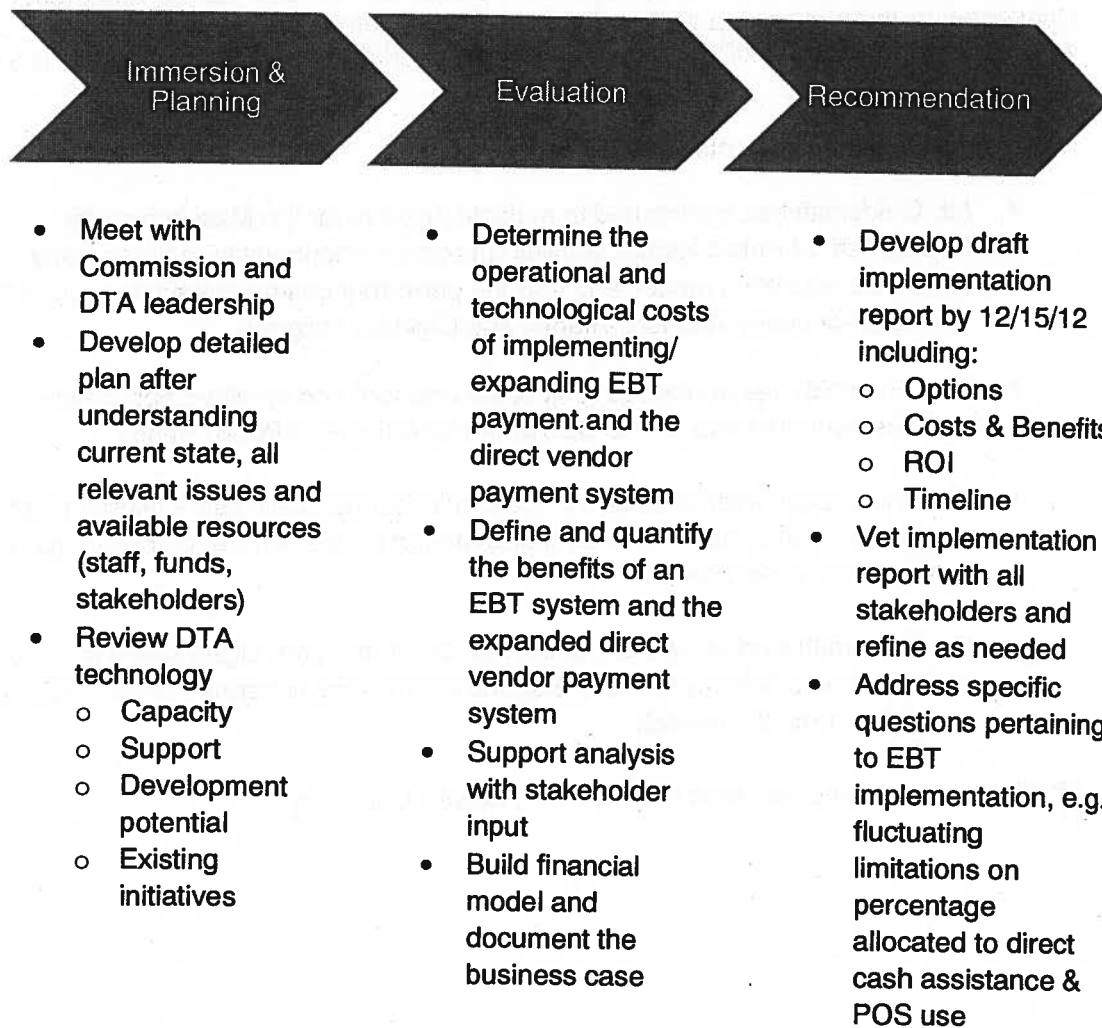
- Mr. Goldsmith has contributed to multiple projects for the Massachusetts Department of Public Health, providing program documentation for an early childhood education model, and offering performance-improvement services for the Massachusetts Women, Infants, and Children Program.
- Mr. Goldsmith has performed project assessment and provided performance-improvement planning for the Delaware Department of Public Health.
- At Conservation International, Mr. Goldsmith coordinated data analysis, media production, and outreach efforts in preparation for the release of the first global evaluation of ocean health.
- Mr. Goldsmith worked with a leading non-profit research organization to improve earnings and efficiency for New England commercial fishermen while reducing their environmental impact.

Mr. Goldsmith earned his BA in History from Harvard University.

# **The Ripples Group**

## **Scope of Services**

The Ripples Group plans to perform all activities outlined in the RFQ. We propose a three-phased approach:



Broadly, we envision that Phase 1 will be completed in October, Phase 2 in November, and Phase 3 in December 2012. The final deliverable will be a clearly written report that outlines options and recommendations, and includes all relevant back-up data and analysis.

This is a high-level plan; we suggest developing a detailed plan as the next step in the process after we learn more about the current reality at DTA. This would be a relatively fast exercise as we are already very familiar with relevant technologies.

As we have proven in dozens of initiatives at Commonwealth agencies, we work very collaboratively and deploy qualified resources as needed.



## **The Ripples Group**

### **Cost Proposal**

Given the limited information in the RFQ, it is difficult to estimate precisely what level of effort is appropriate. We tentatively propose a budget of \$100,000, but we realize that this may change as we learn more about DTA's requirements.

We realize this is a significant investment at a time of budgetary constraints. If there are ways to reduce the work and therefore the budget, we would be motivated to do so. Our goal is for our clients to enjoy many times the return on the investment they make in us.

*We appreciate the opportunity to be considered for this critical undertaking that can lead to substantial service improvements and efficiency gains for DTA and its stakeholders.*



# CONTRACT USER GUIDE



## How to Use PRF46, Management Consultants, Program Coordinators and Planners Services Statewide Contract

**Contract #:** PRF46

**Contract Duration:** 12/28/2010 to 12/31/13

**MMARS #:** PRF46\*

**Options to renew:** 2 options of 1 year each through 12/31/15

**Contract Manager:** William Funk - 617-720-3329 [William.Funk@state.ma.us](mailto:William.Funk@state.ma.us)

**This contract contains:** Small Business Purchasing Program (SBPP), Supplier Diversity Office (SDO) Prompt Payment Discount (PPD) Programs

**Last change date:** 10/23/12

### Contract Summary

Contract awards are for specialized services such as: Economics, Education, Engineering, Health and Social Services, Strategic Sourcing, Transportation, Financial Services, Energy, and the Environment. The contract may be expanded or further limited to the types of services which may be covered or required in the future. This may be done either by amendment or by "open enrollment" at any time during the term of the contract, including any extension periods when it is determined to be in the best interests of the Commonwealth.

The contract was awarded to 51 vendors with 48 active vendors listed on the Comm-PASS Vendor tab and below.

### Benefits and Cost Savings

- Use of Quick Quote form increases order completeness and accuracy for savings;
- Maximum rates have been established for reference against an RFQ, Quick Quote or any negotiations;
- Soliciting quotes from at least three vendors is required prior to issuing an order\*;
- Savings achieved through Statements of Work (sub-agreements) with listed deliverables & budget limits;
- Project Based Pricing, using contract hourly rates, will include all related ancillary project services;
- Ancillary costs in a Statement of Work cannot be exceeded once established and agreed upon;
- Vendors have local, regional, national and international experience;
- Vendor client base includes small and large clients who have a local and national presence;

\*Exemption to this requirement has to be given by the Contract Manager for very specialized services.

### Who Can Use This Contract?

#### Eligible Entities:

01. Cities, towns, districts, counties and other political subdivisions
02. Executive, Legislative and Judicial Branches, including all Departments and elected offices therein;
03. Independent public authorities, commissions and quasi-public agencies
04. Local public libraries, public school districts and charter schools;
05. Public Hospitals, owned by the Commonwealth;
06. Public institutions of high education
07. Public purchasing cooperatives;
08. Non-profit, UFR-certified organizations that are doing business with the Commonwealth;
09. Other states and territories with no prior approval by the State Purchasing Agent required; and
10. Other entities when designated in writing by the State Purchasing Agent.

## Pricing plus Purchase Options & Requirements

**Purchase Options:** Purchases made through this contract will be direct outright purchases.

### Compensation Structure/Pricing & Expenses:

**Negotiations:** Hiring Entities are entitled to negotiate down the maximum rates provided under this contract. Hiring entities should never pay higher rates than the maximum rates under this contract.

**Maximum rates** include: price charged for an individual's work, materials including copying and printing, ALL TRAVEL considerations, communications costs, overhead rates, overtime – including weekend and holidays, and other ancillary charges. Rates charged for "work per \_\_\_\_" are based on Individual per hour; and Individual per day.

**Project Based Pricing:** Contractors might be asked by a Hiring Entity to provide a project based price instead of what has been established by the maximum billing rates provided under this contract, however, the basis of a project based price will be predicated on the "work per \_\_\_\_" basis referenced herein. Under such requests contractors **must include** any and all ancillary services in the project price. Hiring Entities under no circumstance will pay additional invoices related to project based procurement.

**Payments:** The Hiring Entity may require work be paid in increments, as agreed upon deliverables are completed. All billing must be addressed to and with the Hiring Entities providing a breakdown of costs as required.

**Quick Quote:** This functionality is recommended for departments. Review Job Aid: How to Create a Statewide Contract Quick Quote when seeking quotes allowing PRF46 vendors to respond via their SmartBid account. Guidance for vendors would be to visit the Statewide Contract Quick Quote Information web page for information on responding to a Quick Quote or contact the Comm-PASS Help Desk at [comm-pass@state.ma.us](mailto:comm-pass@state.ma.us).

**General Quotes:** Hiring Entities are **required** to solicit quotes from at least three contractors prior to issuing an order. Exemption to this requirement has to be given by the OSD Contract Manager for very specialized services.

## Additional Information

### Important Facts for Buyers:

**Statement of Work (SOW) Requirements:** This is a solution-based contract, the type of services and scope of work which will be generated on a case by case basis in a sub-agreement as the SOW. Contract users are required to use the posted SOW or their department's equivalent version before starting any project with a vendor.

**Business References:** The Hiring Entity may require business references, as deemed appropriate.

**Bonding:** might be required and must be clearly declared in the SOW.

**Rate Sheet:** Ceiling Rates for all vendors are posted on Comm-PASS under the Forms & Terms tab for Management Consultants, Program Coordinators, and Planners on a per hour and per day basis.

## Vendor List and Contract information

*Awarded vendors are listed below. Refer to the "Vendor" tab of Comm-PASS ([www.comm-pass.com](http://www.comm-pass.com)) for vendor involvement in any of the following programs which will have the appropriate icon appearing against their name. Programs include Small Business Purchasing Program (SBPP), Supply Diversity Office Certification (SDO, formerly SOMWBA Certification), Supplier Diversity Program (SDP, formerly AMP), Environmentally Preferable Products Program (EPP) & Prompt Pay Discount PPD).*

### Awarded Vendors (48):

1. Abt Associates Inc.; Christina Anderson; [BDU@abtassoc.com](mailto:BDU@abtassoc.com); 617-349-2856
2. Accenture; William Kilmartin; [william.kilmartin@accenture.com](mailto:william.kilmartin@accenture.com); 617-488-7785

3. American Development Institute, LLC; John Rizzo; [jrizzo@ad-institute.com](mailto:jrizzo@ad-institute.com); 617-744-9234; SBPP
4. Bailit Health Purchasing, LLC; Michael Bailit; [jbailit@bailit-health.com](mailto:jbailit@bailit-health.com); 781-453-1166; SBPP
5. Cambridge Systematics, Inc.; Jennifer DiCarlo; [prequalifications@camsys.com](mailto:prequalifications@camsys.com); 617-354-0167
6. CDW Consultants, Inc.; Yee Cho; [ycho@cdwconsultants.com](mailto:ycho@cdwconsultants.com); 508-875-2657x18; SBPP, SDO
7. Center for Ecological Technology; Nancy Nysten; [nancyn@cetonline.org](mailto:nancyn@cetonline.org); 413-445-4556 x10
8. Debora Bloom Associates; Debora Bloom; [DBloom@DBloomAssociates.com](mailto:DBloom@DBloomAssociates.com); 617-323-6566; SBPP, SDO
9. Dougherty Management Assoc, Inc.; Richard Dougherty; [dickd@dmahealth.com](mailto:dickd@dmahealth.com); 781-863-8003; SBPP
10. DSM Environmental Services, Inc.; Ted Siegler; [ted@dsmenvironmental.com](mailto:ted@dsmenvironmental.com); 802-674-2840 x101
11. Eastern Research Group; Gail Schubert; [gail.schubert@erg.com](mailto:gail.schubert@erg.com); 781-674-7350
12. EnerNOC; Conor Carlin; [ccarlin@enernoc.com](mailto:ccarlin@enernoc.com); 617-692-2515
13. Fortress, Inc.; Albert Samano III; [asamano@fortressteam.com](mailto:asamano@fortressteam.com); 512-248-0548; SDO
14. Green Building Concepts Kimberly Cullinane [kim@greenbuildingconcepts.net](mailto:kim@greenbuildingconcepts.net) 508.353.5806 SBPP SDO
15. HDR Engineering, Inc.; Kathy Duggan; [kathy.duggan@hdrinc.com](mailto:kathy.duggan@hdrinc.com); 617-357-7751
16. Heidi L. Hoffman; Heidi Hoffman; [email@heidihoffman.net](mailto:email@heidihoffman.net); 617-720-7123; SBPP
17. Hope Worden Kenefick Consulting; Hope Kenefick; [hopenwk@comcast.net](mailto:hopenwk@comcast.net); 508-440-5050; SBPP
18. HRP Associates Inc.; Jeffrey Sotek; [jeff.sotek@hrpassociates.com](mailto:jeff.sotek@hrpassociates.com); 508-407-0009
19. ICF International; Erin Healy; [EHealy@icfi.com](mailto:EHealy@icfi.com); 781-676-4043
20. Industrial Economics, Inc.; Kyle Barney; [KBarney@indecon.com](mailto:KBarney@indecon.com); 617-354-0074
21. Isurus Market Research and Consulting LLC; John Cole; [jcole@isurusmrc.com](mailto:jcole@isurusmrc.com); 617-547-2400; SBPP
22. Jane Moore Consulting; Jane Moore; [jmooreconsulting@comcast.net](mailto:jmooreconsulting@comcast.net); 617-680-2508; SBPP, SDO
23. JSI Research & Training Institute; Lori McGowan; [lmcgowan@jsi.com](mailto:lmcgowan@jsi.com); 617-482-9485
24. Justice Resource Institute, Inc; Andrew Pond; [MARFP@jri.org](mailto:MARFP@jri.org); 617-450-0500 x324; SDO
25. Kessler Consulting, Inc.; Mitch Kessler; [mk@kesconsult.com](mailto:mk@kesconsult.com); 813-971-8333x11
26. Lynn Rose; Lynn Rose; [lynnfaith@comcast.net](mailto:lynnfaith@comcast.net); 413-774-6540; SBPP
27. M+R Strategic Services; Lori Fresina; [lfresina@mrss.com](mailto:lfresina@mrss.com); 617-686-3625
28. Mabbett & Associates, Inc.; Paul Steinberg; [steinberg@mabbett.com](mailto:steinberg@mabbett.com); 781-275-6050 x306; SBPP
29. Mathematica Policy Research, Inc Pamela Tapscott; [rpfcenter@mathematica-mpr.com](mailto:rpfcenter@mathematica-mpr.com); 202-484-9220
30. MetaView Consulting & Coaching; Steve Frigand; [sfrigand@metaviewcc.com](mailto:sfrigand@metaviewcc.com); 781-646-7180; SBPP
31. Nancy LaPelle, PhD Consulting; Nancy LaPelle; [nlapelle@comcast.net](mailto:nlapelle@comcast.net); 508-305-2627; SBPP, SDO
32. Navigant Consulting, Inc.; Maria Duaiame; [maria.duaiame@navigant.com](mailto:maria.duaiame@navigant.com); 781-270-8355
33. NJL Communication; Nancy Lyons; [nancy@njlcommunication.com](mailto:nancy@njlcommunication.com); 617-791-3993; SBPP
34. Northeast Recycling Council; Lynn Rubinstein; [n@nerc.org](mailto:n@nerc.org); 802-254-3636
35. Pam McCarthy and Associates, Inc.; Pam McCarthy; [pammccarthy2@comcast.net](mailto:pammccarthy2@comcast.net); 651-484-3467
36. Peregrine Energy Group, Inc.; Paul Gromer; [info@peregrinegroup.com](mailto:info@peregrinegroup.com); 617-367-0777x228; SBPP
37. Policy Studies Inc.; Janie Faulk; [smclaughlin@policy-studies.com](mailto:smclaughlin@policy-studies.com); 303-863-0900
38. Reidy Associates; Deborah Reidy; [deborah@reidyassociates.org](mailto:deborah@reidyassociates.org); 413-536-9256; SBPP, SDO
39. SITEC Environmental, Inc; A. Raymond Quinn; [rquinn@sitec-engineering.com](mailto:rquinn@sitec-engineering.com); 781-319-0100x12; SBPP
40. Skumatz Economic Research Associates, Inc.; Lisa Skumatz; [skumatz@serainc.com](mailto:skumatz@serainc.com); 303-494-1178
41. Synapse Energy Economics Inc; Melissa Schultz; [mschultz@synapse-energy.com](mailto:mschultz@synapse-energy.com); 617-453-7037; SBPP
42. Tellus Institute; James Goldstein; [jgold@tellus.org](mailto:jgold@tellus.org); 617-266-5400; SBPP
43. The Cadmus Group, Inc.; David Beavers; [compass@CadmusGroup.com](mailto:compass@CadmusGroup.com); 617-673-7000
44. The Ripples Group; Thomas Innis; [tinnis@ripplesgroup.com](mailto:tinnis@ripplesgroup.com); 617-435-8587
45. UMass Donahue Institute; Laura Eve-Cowles, EdD; [leve-cowles@donahue.umassp.edu](mailto:leve-cowles@donahue.umassp.edu); 413-545-0001
46. Ventana Systems, Inc.; Mary Neil; [mary@ventanasystems.com](mailto:mary@ventanasystems.com); 413-567-7039; SBPP
47. Weston & Sampson Engineers, Inc.; Kimberly Plourde; [plourdek@wseinc.com](mailto:plourdek@wseinc.com); 978-532-1900
48. World Energy Solutions, Inc.; Jonathan Harvey; [jharvey@worldenergy.com](mailto:jharvey@worldenergy.com); 508-459-8100

## Strategic Sourcing Services Team Members

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Mary-Anne Siok, DOE, [Mary-Anne.siok@state.ma.us](mailto:Mary-Anne.siok@state.ma.us)

## Summary of Where to Obtain Important Contract Information

To obtain in depth contract information please go to the Comm-PASS ([www.comm-pass.com](http://www.comm-pass.com)) website, click on "Contracts" then search by document number PRF46 to locate the following contract information:

Contract User Guide

Statement of Work (SOW)

New Rate Sheet

Request for Response (RFR)

"Forms & Terms" tab

"Forms & Terms" tab

"Forms & Terms" tab

"Forms & Terms" tab

End